10/30/2009

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About the DocumentMall Plugin

The DocumentMall plug-in acts as a bridge between Reform and DocumentMall. It allows you to archive processed forms to a DocumentMall account for later retrieval. The plug-in is very flexible, as it allows you to set up the DocumentMall account with static and/or dynamic values, which allows you to better organize your documents.

Reform 12 maximizes the integration with Ricoh's DocumentMall by enabling automatic delivery of document information from any operating system, application or device. Whether a document is being printed from the host, scanned in using an MFP or copier, or generated by a user from an application, Reform will capture the process, extract the text and intelligently archive it to DocumentMall. With Reform's alternative input options, more of your valuable information can be effortlessly accessed and easily shared company-wide through DocumentMall. Reform can control directory locations as well as custom index information to simplify document retrieval. Full text searches can be performed to quickly find specific information stored in PDF, TIFF, or any other files. Fast and easy access to important information is an extremely vital resource, and Reform's integration capabilities to DocumentMall let you obtain the most comprehensive document information archive to improve the workflow of your business operations.

System Requirements

- Reform 12 Enterprise or Reform 12 PDC
- DocumentMall Plugin
- DocumentMall Upload Agent Monitor – This will be automatically installed with the DocumentMall Plugin during the installation.
- For Evaluation and Demonstration: Windows XP, Windows 2003 Server, Windows Vista, Windows 7 or Windows 2008 Server (64 Bit Operating Systems are Supported)
- For Production Systems: Windows 2003 Server or Windows 2008 Server (64 Bit Operating Systems are Supported)
- Microsoft .NET Framework 2.0 (this will be automatically installed if the installer does not find it on the system)

All required Reform software downloads can be found at www.fabsoft.com >> Downloads section.

Hardware Requirements

- Production System Recommendation (These suggestions are only estimations. High load environments may require multiple servers, or additional hardware.)

1. Pentium 4 Processor
2. 4 GB RAM
3. HDD Space 100 GB (Redundancy recommended)
4. Battery Backup (UPS)
5. Dedicated server, no other software products except for virus and security programs.

- Minimum System Requirements for demonstration purposes only
    1. Pentium 4 Processor
    2. 2 GB RAM
    3. HDD Space 30 GB

Hardware specifications depend greatly on the workload and throughput that is required. Higher end processors and greater amounts of memory will increase the amount of information and data that Reform can process thus improving overall system throughput. For load balancing or failover, multiple servers can also be used. (Note: A license for Reform and each plug-in is required for each server running the software.) Before obtaining the server that you plan on utilizing for Reform, please check the plug-ins' user manuals for System Requirements as well as they may require additional hardware. For production systems, we also recommend redundant hard drives utilizing the mirroring features of RAID (Redundant Array of Independent Disks) to minimize data loss and expedite system recovery in the event of a hardware failure. Battery backups are also suggested to maintain system uptime and reliability in case of power failures.

Installation

To install the DocumentMall Plugin components, download and run the installer.

Step through the prompts and accept the User License Agreement. The installation will begin. The DocumentMall Upload Agent Service is automatically installed and started when you install the DocumentMall Plugin. The Microsoft .NET Framework will be automatically downloaded and installed if it is not already present on the system. Allow the installation to complete and then read on to the next section to learn how to set up DocumentMall integration.

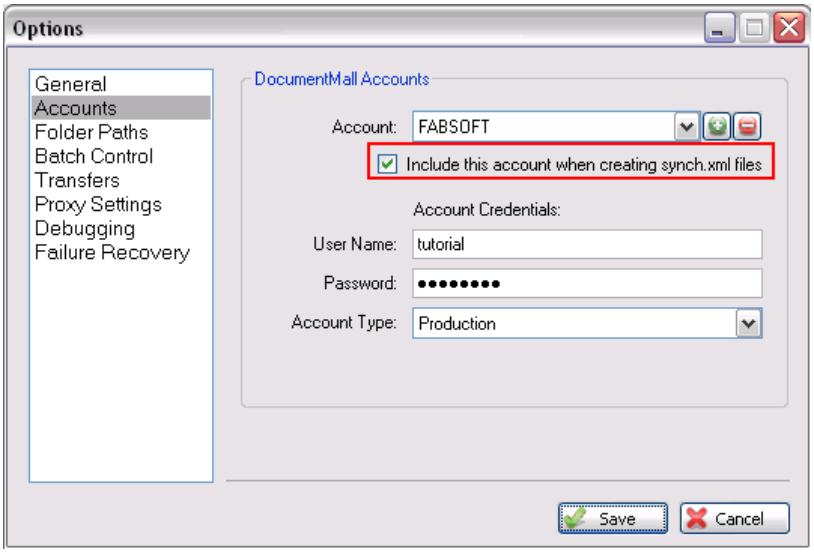
Plugin Registration and Licensing

When evaluating Reform 12, the plugins will also be in an evaluation mode for that period of time. Once Reform has been purchased and licensed, the required plugins must also be licensed in order to continue functioning correctly.
Please see the "Reform 12 Licensing and Registration" section of the Reform 12 User Manual for more information on how to license Reform 12 Plug-ins. After the license is entered, the Reform Spooler will need to be restarted to refresh the licenses. More information regarding the Reform Spooler Service can be found in the Reform 12 User Manual.

Sending Your First Document to DocumentMall

Implementing DocumentMall integration into your workflow consists of installing the plug-in, entering your DocumentMall account information into the Upload Agent settings, and setting up your form. Since we have already covered the installation process, the first thing we need to do is add an account to the DocumentMall Upload Agent.

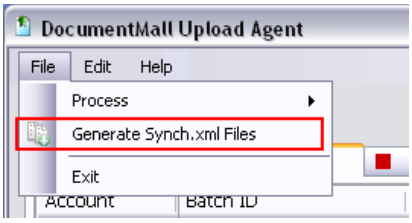
1. DocumentMall might run right after you install it. If so, you should see the icon in the system tray (next to the clock). **Double click on this icon to bring up the DocumentMall Upload Agent.**
2. If it is not running, you can start it by going to:
   Start>Programs>Reform…>DocumentMall>Upload Agent
3. Open the options window by going to **Edit>Options**. It will prompt you for a password. The password is:
   dmuaconfig
4. Click on the **Accounts** item in the left list.
5. Click the button on the right to add a new account. We are going to add the FabSoft Tutorial account that has been set up for demonstration purposes.
6. Enter the following information:
   Account Name: FABSOFT
   User Name: tutorial
   Password: tutorial
   Account Type: Production
   Select the option **Include this account when creating synch.xml files**.



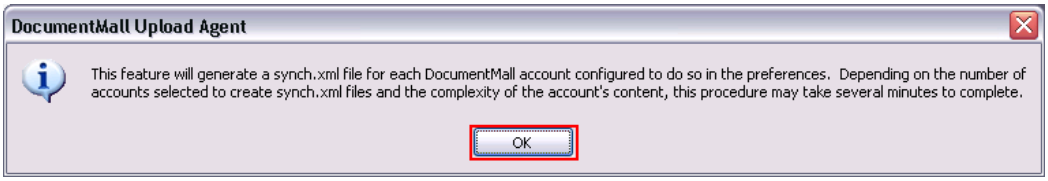
Make sure that you check the option 'Include this account when creating synch.xml files'!

7. Click **Save** to save your options.
8. In the main window of the Upload Agent, go to:

   File>Generate Synch.xml Files



9. Click **OK** at the prompt. Wait for the process to finish. After it completes, you can close the DocumentMall Upload Agent.


DocumentMall Upload Agent
This feature will generate a synch.xml file for each DocumentMall account configured to do so in the preferences. Depending on the number of accounts selected to create synch.xml files and the complexity of the account's content, this procedure may take several minutes to complete.
OK

10. Now we need to configure Reform. Open the Reform Designer by going to **Start>Programs>Reform…>Designer**.
11. For the example, we will be creating a new form with an existing template. In the Reform Designer, go to **File>New>New**. Select the **DocumentMall.FTM** and click **OK.**

DOCUMENTMALL.FTM
DocumentMall - Car Dealership Form

12. When it asks if you would like to open a text file for designing, select **No**.

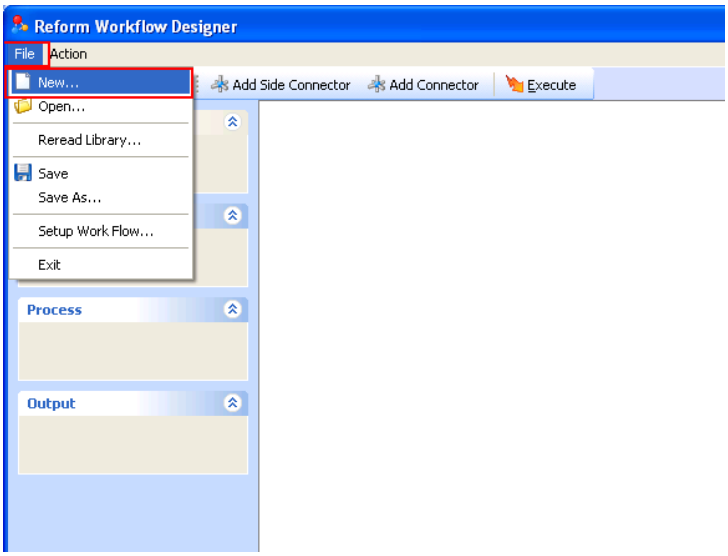
13. Next, go to **File>Save** to save your form. Name it **DocumentMall.FOM**.

14. You can now close the Reform Designer since we have our form which we will be using alongside the Workflow Designer to route the document.

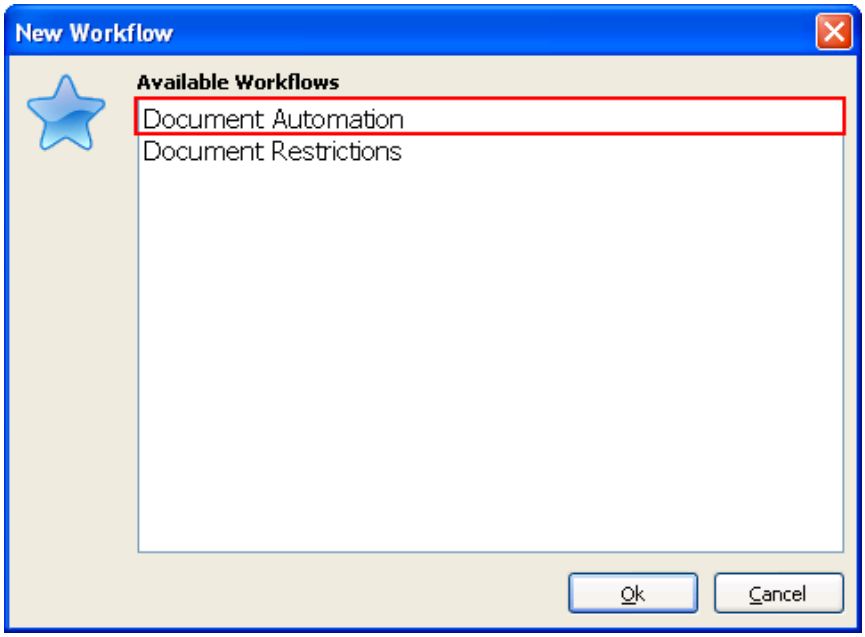
*Now that we have our form, we can begin to create the desired DocumentMall workflow using the Workflow Designer. First, the Workflow Designer must be started.

15. To open it, go to **Start>Programs>Reform…> Workflow Designer.**

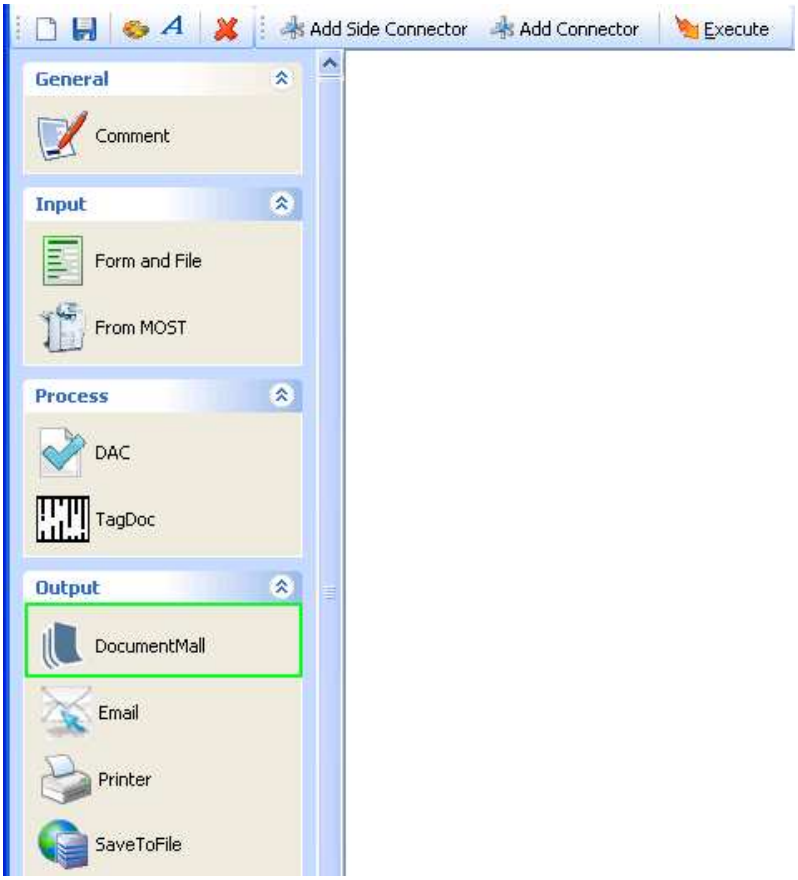
16. Once open, we must go to **File > New…**



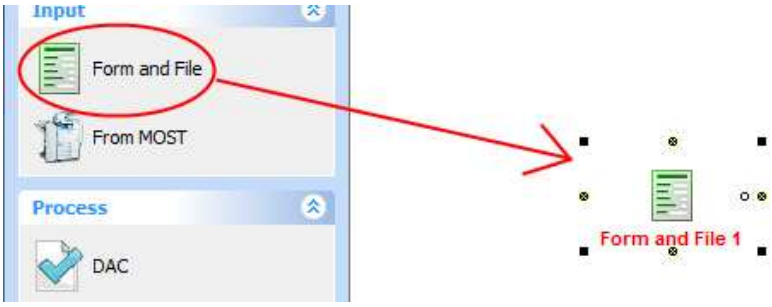
17. Select **“Document Automation”** and click **Ok.**



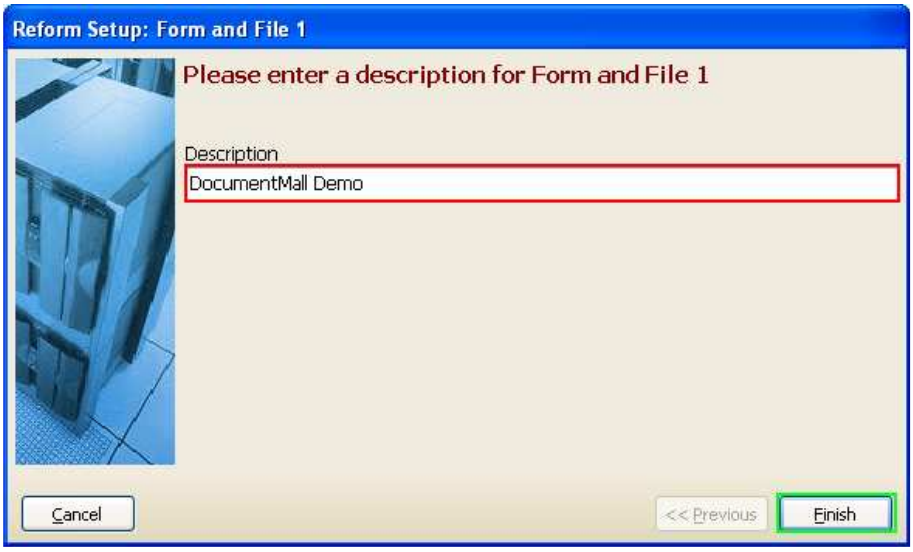
18. You will now notice that your Inputs, Processes and Outputs have been populated by the various plugins you have installed (DocumentMall being one of the Outputs)



19. We can now start adding the necessary components to the workflow. First, drag and drop a **Form and File** object onto the workflow by clicking and holding your mouse on **Form and File** and then moving your mouse over to the workflow and releasing the mouse button.

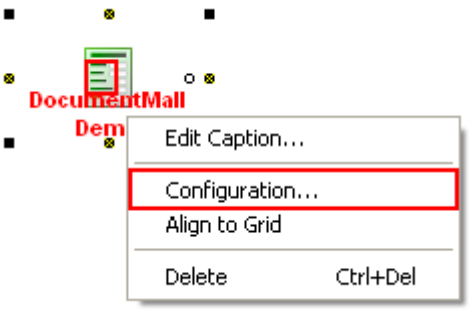


*You will be prompted with the following dialog:

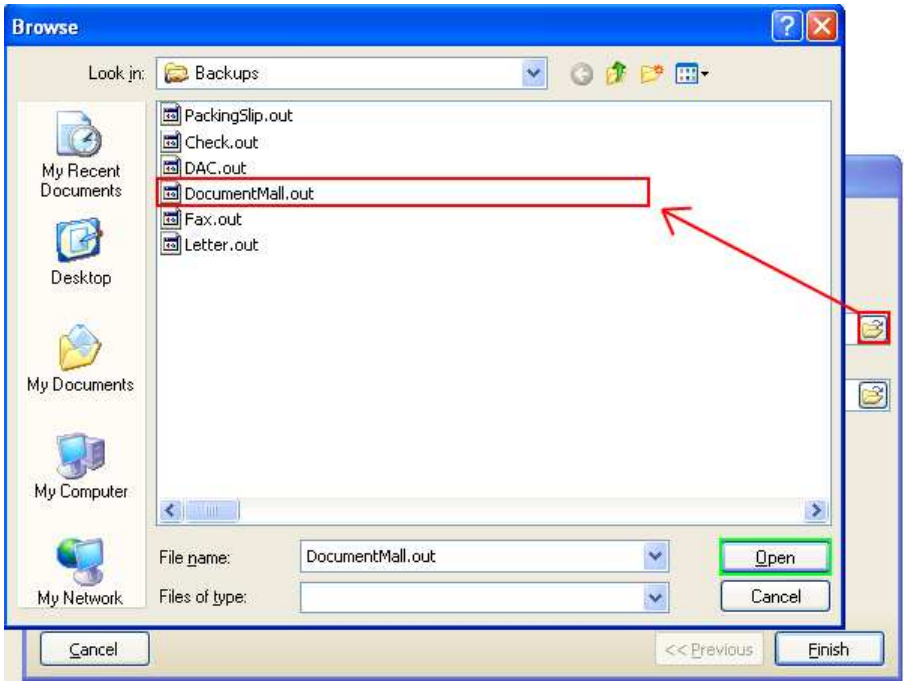


20. Enter a description for the object you just added. This is done by typing in the provided box. Type **"DocumentMall Demo"** and click **Finish**. This will take you back to your workflow.

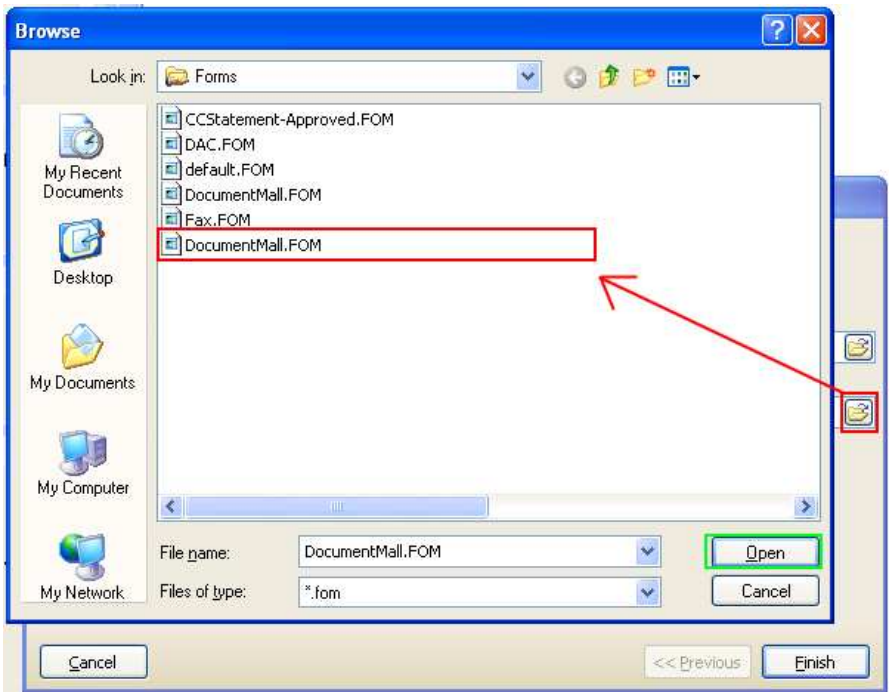
21. Now we are ready to configure the "**DocumentMall Demo**" form and input file. To do so, right click on the newly added object and select **"Configuration…"** or simply **double-click** on it.



22. You are now presented with the Input Setup window. First, we want to select the TextFile or data stream that our form will be using. To do so, you can simply begin typing in the box, or you can browse to find it. We want to select the **DocumentMall.out** file from **\Reform…\Backups**. Click the small folder icon to bring up a window which will let us choose that file. Select the file and click **Open**.



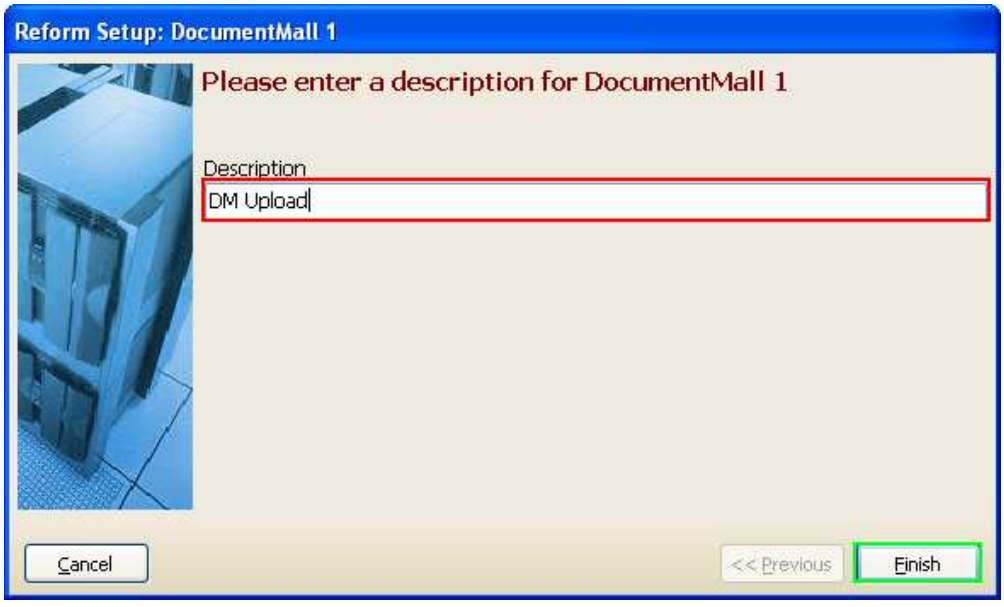
23. After choosing the text file, you are taken back to the Input Setup page so that you can select a form. Click the small folder icon to bring up a window which will let us choose the desired **DocumentMall.FOM** form file. Select the file and click **Open**.



24. Now that you have both your Input Text File and Reform Form selected, the setup of **Form and File** is complete. You can quickly double check that the correct files are selected and then click **Finish**.

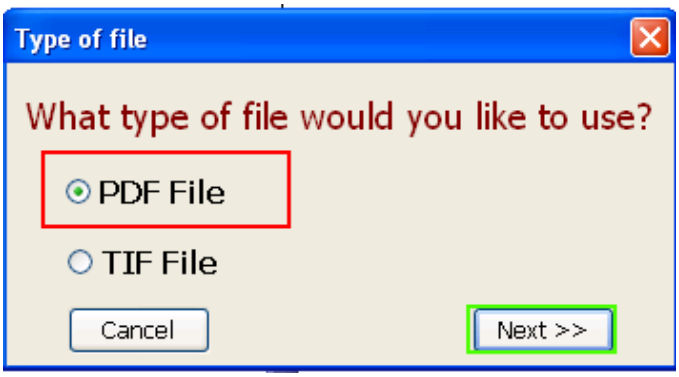
25. You will also be prompted to add a page-break field to the forms. At this point, we want to select **No.**

26. To finish the DocumentMall workflow, we want to add a DocumentMall Output. We use the same drag and drop procedure as with the **Form and File** (see step 19). Take your mouse and drag the "**DocumentMall**" object from under Output onto the workflow somewhere below your Input. Once you release your mouse, you will be prompted to describe "**DocumentMall**". Type "**DM Upload**" in the box and then click **Finish**.

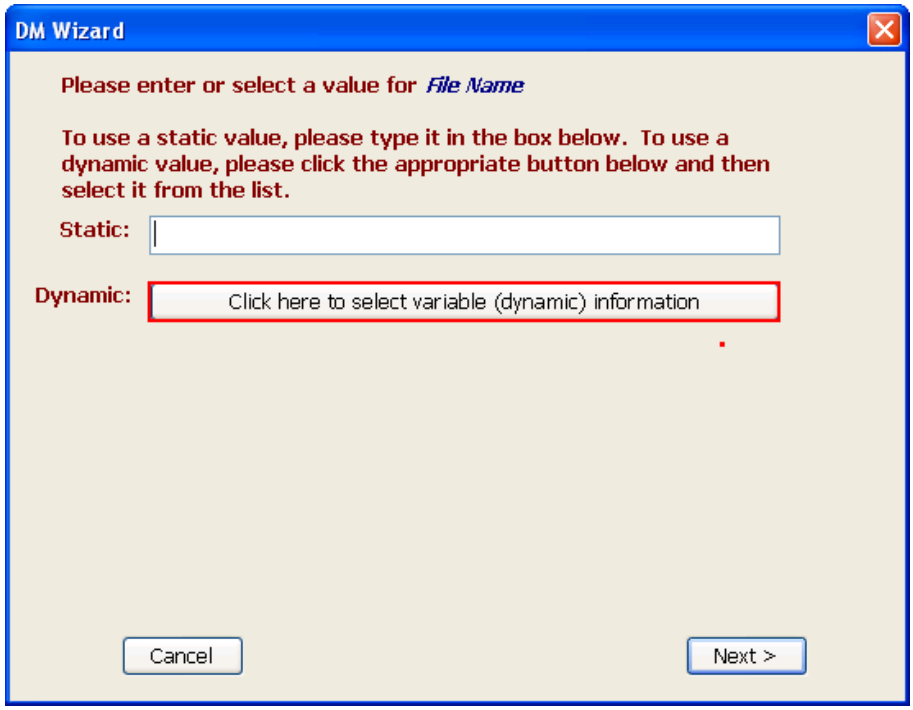


27. Once you click Finish, you are taken back to your workflow. Your **DocumentMall** will have a **Red** Caption because it is not yet configured. To configure **DocumentMall**, you must first connect the Form and File object titled "**DocumentMall Demo**". To do so, first select the "**Add Connector**" button from the menu bar. Next, drag your mouse from the small "**x**" underneath "**DocumentMall Demo"** to the small "**x**" above "**DM Upload**" as pictured below. When the connection is complete, the connecter will turn black (if red, connection has not been made correctly, try again) and the "**DocumentMall Demo**" caption will turn **green**.

28. You will be prompted to configure **DocumentMall** upon completing the connection. Click **Yes.** If you chose not to, you can also **double click** on the DocumentMall object or **rightclick** and select **"Configuration**…" This configuration will step you through all the settings necessary for **DocumentMall** to successfully connect to a DocumentMall server and upload files. The first piece of information is the file type you want your document to be archived with into DocumentMall. Select "**PDF File"** and click **Next.**

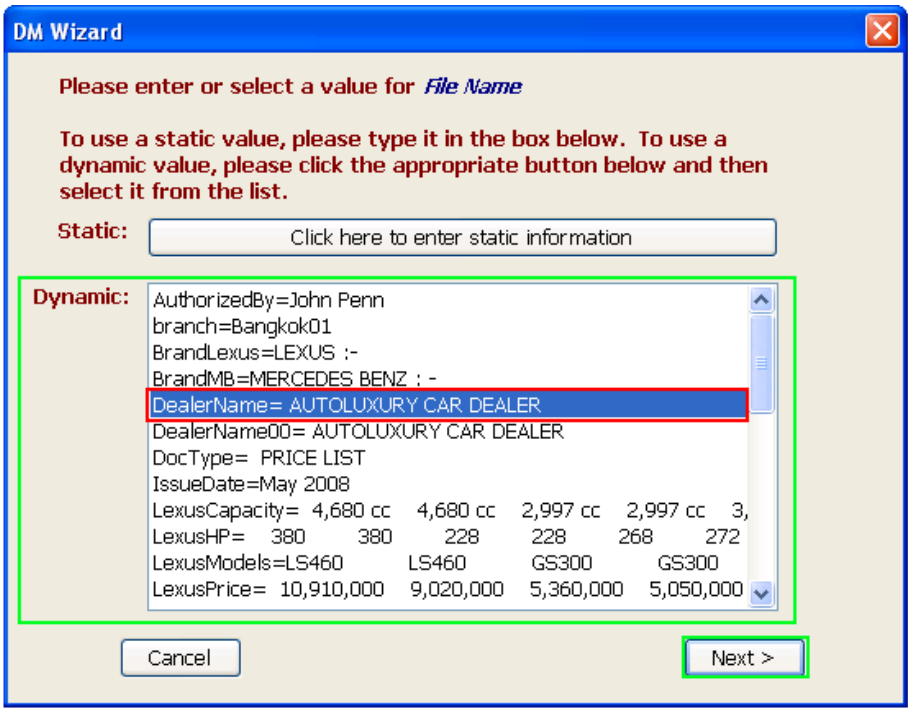


29. The second prompt will ask you for the **File Name**. This is what will be used to identify the document once it is posted into a Document Mall cabinet. Here we would like to use data that is available in the data stream instead of a static value. To do so, we first must click the "**Click here to select variable information**" button.

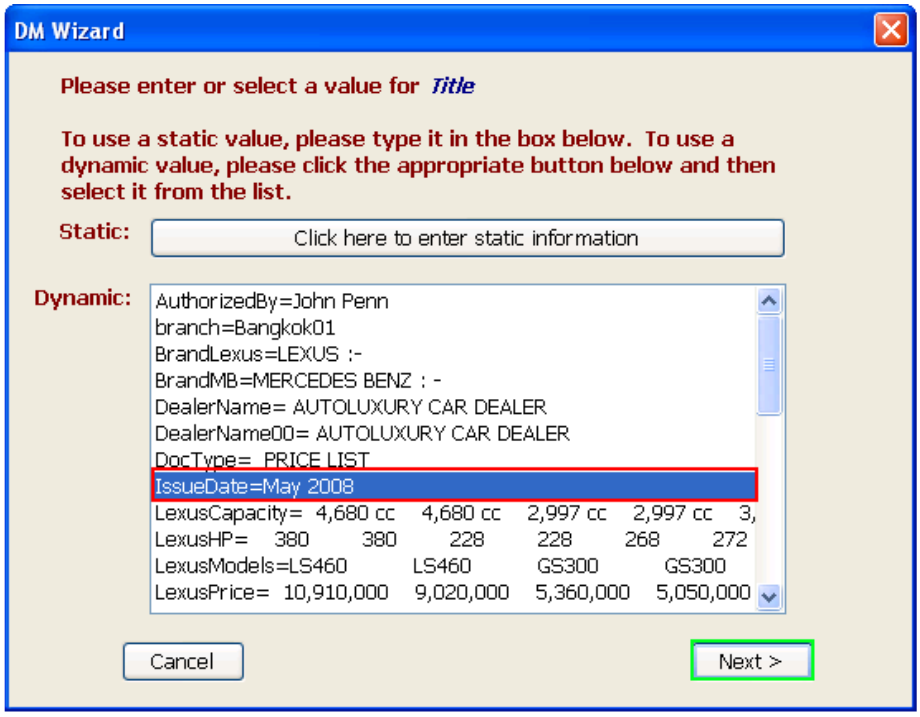

DM Wizard
Please enter or select a value for File Name
To use a static value, please type it in the box below. To use a dynamic value, please click the appropriate button below and then select it from the list.
Static:
Dynamic:
Click here to select variable (dynamic) information
Cancel
Next >

*Note-After doing so, we see that a list will appear with the different fields that you can choose for your variable data. If you want to go back to static input mode, you can do so by clicking the appropriate button for static information and then you will be able type static information.

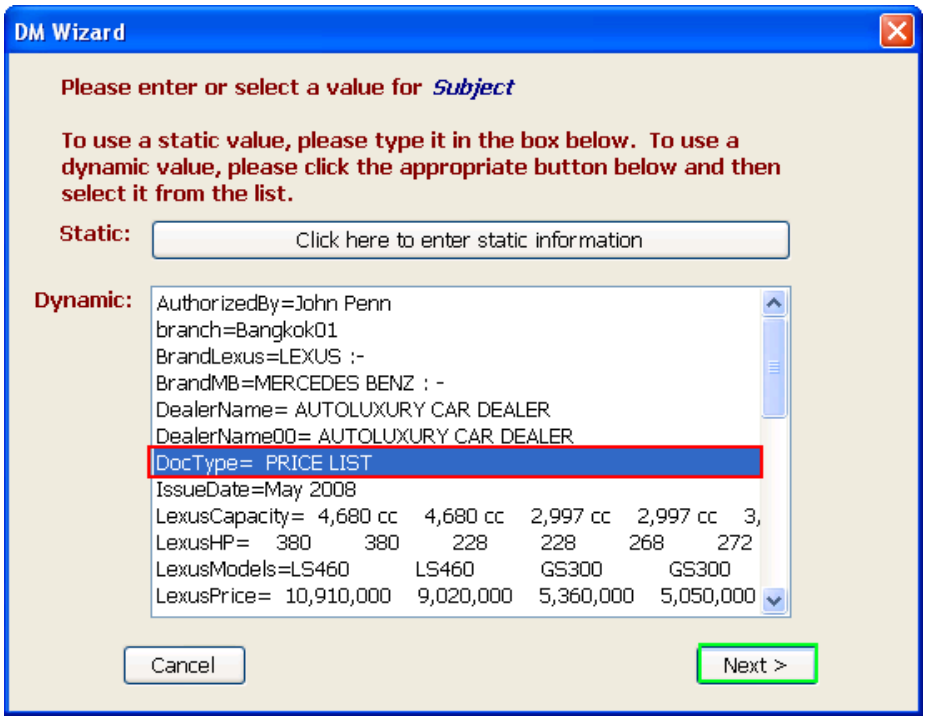
We want to use **DealerName** as our "**File Name**" value. To do so, select **DealerName** from the list and click **Next**.


DM Wizard
Please enter or select a value for File Name
To use a static value, please type it in the box below. To use a dynamic value, please click the appropriate button below and then select it from the list.
Static:
Click here to enter static information
Dynamic:
AuthorizedBy=John Penn
branch=Bangkok01
BrandLexus=LEXUS :-
BrandMB=MERCEDES BENZ : -
DealerName= AUTOLUXURY CAR DEALER
DealerName00= AUTOLUXURY CAR DEALER
DocType= PRICE LIST
IssueDate=May 2008
LexusCapacity= 4,680 cc 4,680 cc 2,997 cc 2,997 cc 3,
LexusHP= 380 380 228 228 268 272
LexusModels=LS460 LS460 GS300 GS300
LexusPrice= 10,910,000 9,020,000 5,360,000 5,050,000
Cancel
Next >

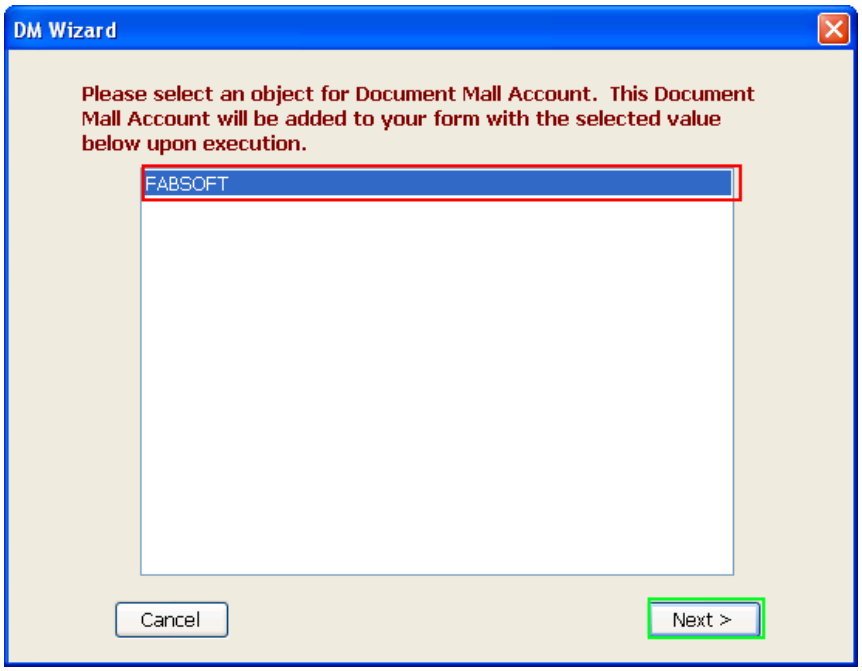
30. For "**Title**", we would like to again use variable data from the print stream. To do so, first click the button "**Click here to select variable data**". From the list that appears, select **IssueDate** and click **Next.**


DM Wizard
Please enter or select a value for Title
To use a static value, please type it in the box below. To use a dynamic value, please click the appropriate button below and then select it from the list.
Static:
Click here to enter static information
Dynamic:
AuthorizedBy=John Penn
branch=Bangkok01
BrandLexus=LEXUS :-
BrandMB=MERCEDES BENZ : -
DealerName= AUTOLUXURY CAR DEALER
DealerName00= AUTOLUXURY CAR DEALER
DocType= PRICE LIST
IssueDate=May 2008
LexusCapacity= 4,680 cc 4,680 cc 2,997 cc 2,997 cc 3,
LexusHP= 380 380 228 228 268 272
LexusModels=LS460 LS460 GS300 GS300
LexusPrice= 10,910,000 9,020,000 5,360,000 5,050,000
Cancel
Next >

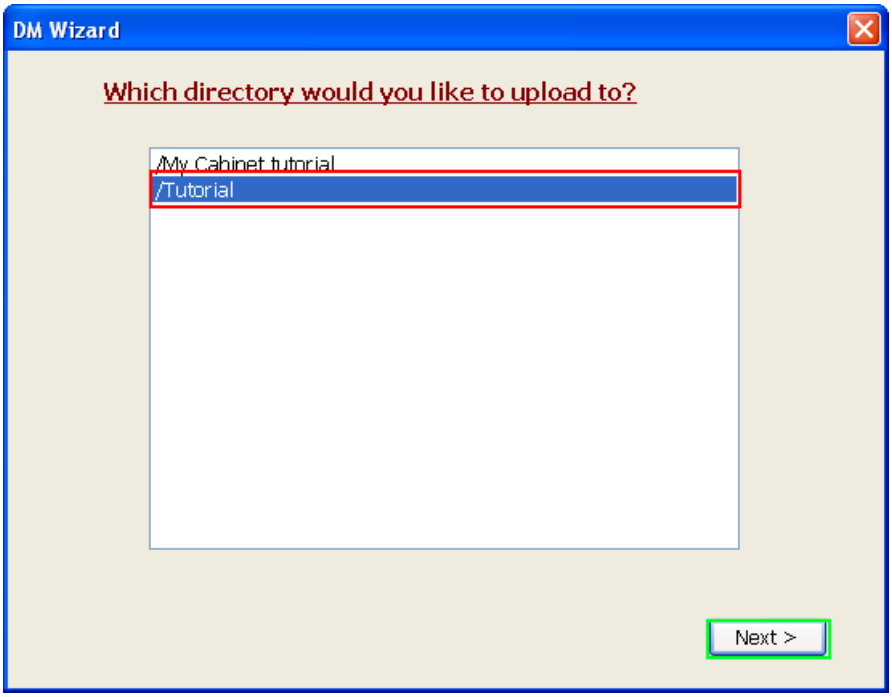
31. The next prompt will ask for the **Subject**. For "**Subject**", we would like to use variable data from the print stream. To do so, first click the button "**Click here to select variable data**". From the list that appears, select **Doc Type** and click **Next.**


DM Wizard
Please enter or select a value for Subject
To use a static value, please type it in the box below. To use a dynamic value, please click the appropriate button below and then select it from the list.
Static:
Click here to enter static information
Dynamic:
AuthorizedBy=John Penn
branch=Bangkok01
BrandLexus=LEXUS :-
BrandMB=MERCEDES BENZ : -
DealerName= AUTOLUXURY CAR DEALER
DealerName00= AUTOLUXURY CAR DEALER
DocType= PRICE LIST
IssueDate=May 2008
LexusCapacity= 4,680 cc 4,680 cc 2,997 cc 2,997 cc 3,
LexusHP= 380 380 228 228 268 272
LexusModels=LS460 LS460 GS300 GS300
LexusPrice= 10,910,000 9,020,000 5,360,000 5,050,000
Cancel
Next >

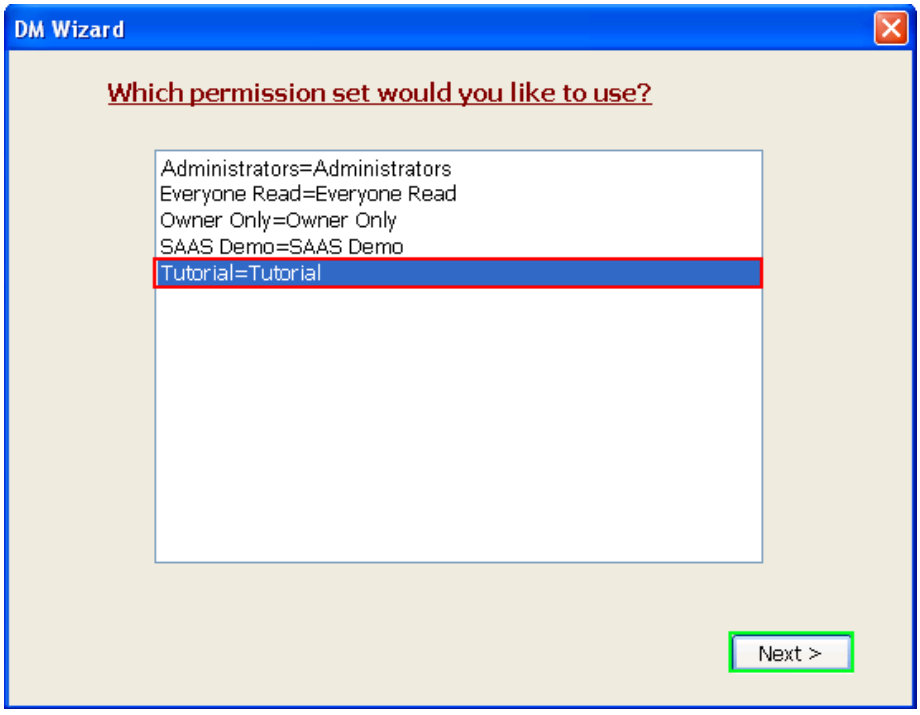
32. Next piece of information needed is the **DocumentMall account** to use. This will list all accounts that have been set up in the Upload Agent. Select the **FABSOFT** account and click **Next**.


DM Wizard
Please select an object for Document Mall Account. This Document Mall Account will be added to your form with the selected value below upon execution.
FABSOFT
Cancel
Next >

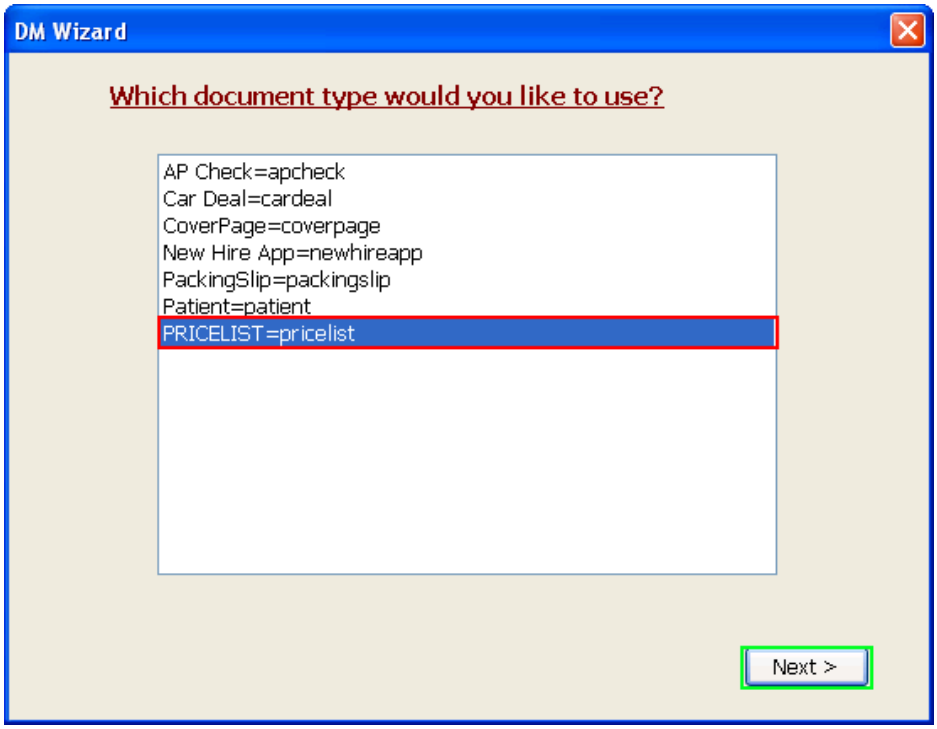
33. Next it will ask you which Document Mall directory you would like to upload the file to. Select **/Tutorial** and click **Next.**



34. It will now ask for the permission set. Choose **Tutorial=Tutorial**, then click **Next**.

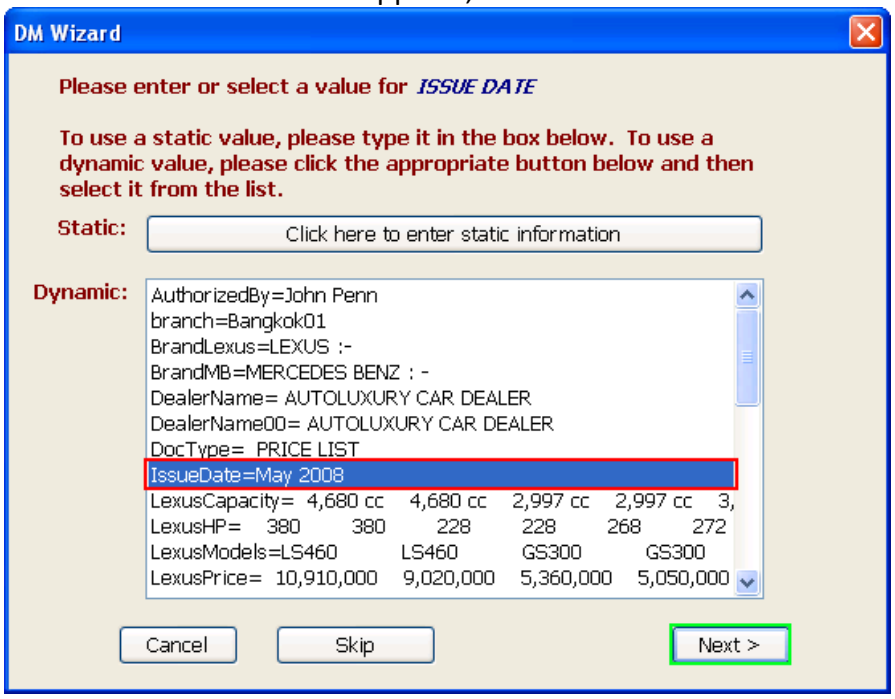


35. It will ask you for the document type. Select the object **PRICELIST** and click **Next**.

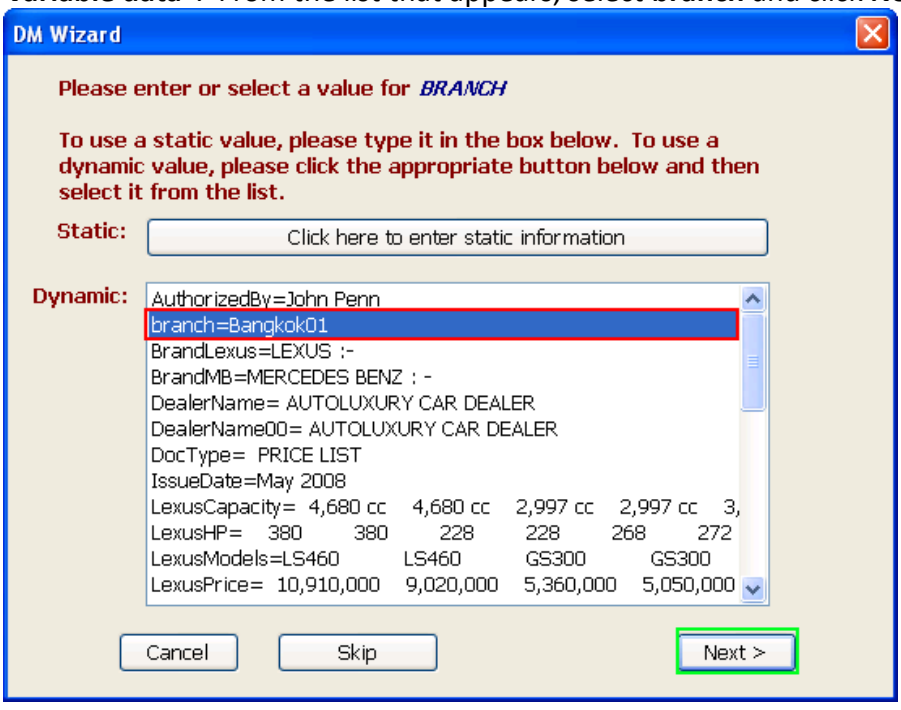


***Now it will ask you to select the attributes associated with the PRICELIST document type.**

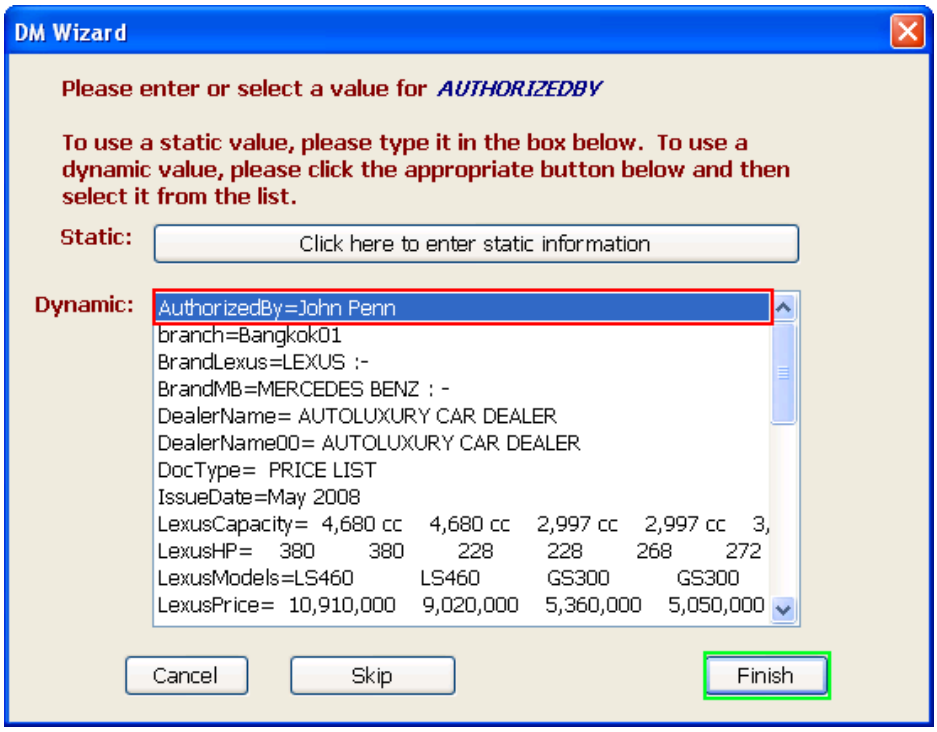
36. The first attribute is **ISSUE DATE**. We would like to use variable data from the print stream for this attribute. To do so, first click the button "**Click here to select variable data**". From the list that appears, select **ISSUEDATE** and click **Next.**


DM Wizard
Please enter or select a value for ISSUE DATE
To use a static value, please type it in the box below. To use a dynamic value, please click the appropriate button below and then select it from the list.
Static:
Click here to enter static information
Dynamic:
AuthorizedBy=John Penn
branch=Bangkok01
BrandLexus=LEXUS :-
BrandMB=MERCEDES BENZ : -
DealerName= AUTOLUXURY CAR DEALER
DealerName00= AUTOLUXURY CAR DEALER
DocType= PRICE LIST
IssueDate=May 2008
LexusCapacity= 4,680 cc 4,680 cc 2,997 cc 2,997 cc 3,
LexusHP= 380 380 228 228 268 272
LexusModels=LS460 LS460 GS300 GS300
LexusPrice= 10,910,000 9,020,000 5,360,000 5,050,000
Cancel
Skip
Next >

37. The next attribute is the **Branch**. We would like to again use variable data from the print stream for this attribute. To do so, first click the button "**Click here to select variable data**". From the list that appears, select **branch** and click **Next.**

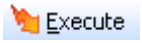

DM Wizard
Please enter or select a value for BRANCH
To use a static value, please type it in the box below. To use a dynamic value, please click the appropriate button below and then select it from the list.
Static:
Click here to enter static information
Dynamic:
AuthorizedBy=John Penn
branch=Bangkok01
BrandLexus=LEXUS :-
BrandMB=MERCEDES BENZ : -
DealerName= AUTOLUXURY CAR DEALER
DealerName00= AUTOLUXURY CAR DEALER
DocType= PRICE LIST
IssueDate=May 2008
LexusCapacity= 4,680 cc 4,680 cc 2,997 cc 2,997 cc 3,
LexusHP= 380 380 228 228 268 272
LexusModels=LS460 LS460 GS300 GS300
LexusPrice= 10,910,000 9,020,000 5,360,000 5,050,000
Cancel
Skip
Next >

38. The last attribute is **AUTHORIZEDBY**. We would like to use variable data from the print stream for this attribute. To do so, first click the button "**Click here to select variable data**". From the list that appears, select **AuthorizedBy** and click **Finish.**

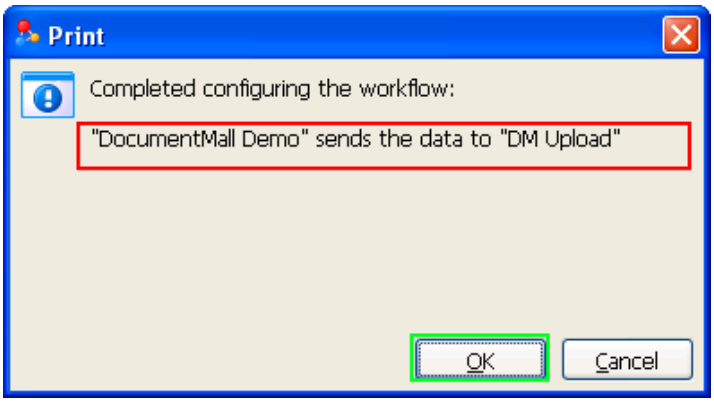

DM Wizard
Please enter or select a value for AUTHORIZEDBY
To use a static value, please type it in the box below. To use a dynamic value, please click the appropriate button below and then select it from the list.
Static:
Click here to enter static information
Dynamic:
AuthorizedBy=John Penn
branch=Bangkok01
BrandLexus=LEXUS :-
BrandMB=MERCEDES BENZ : -
DealerName= AUTOLUXURY CAR DEALER
DealerName00= AUTOLUXURY CAR DEALER
DocType= PRICE LIST
IssueDate=May 2008
LexusCapacity= 4,680 cc 4,680 cc 2,997 cc 2,997 cc 3,
LexusHP= 380 380 228 228 268 272
LexusModels=LS460 LS460 GS300 GS300
LexusPrice= 10,910,000 9,020,000 5,360,000 5,050,000
Cancel
Skip
Finish

39. You have completing configuring your simple DocumentMall workflow. Your 2 objects ("DocumentMall Demo" and "DM Upload") should both be green meaning they have been successfully configured and the workflow is ready to be created.

40. To make all the appropriate forms and changes, the workflow must be executed.

    This is done by clicking the "**Execute**" button 

on the menu bar. After execution, you will be notified about what has taken place. Click **OK.**



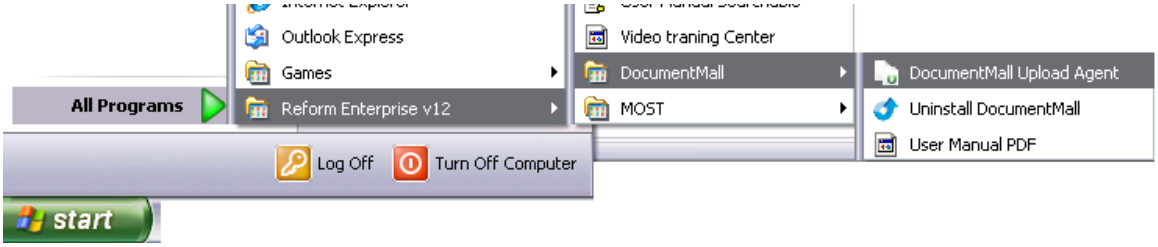
41. You can now close the Workflow Designer. Your form has been saved in your default forms directory. A backup of your original **DocumentMall.FOM** file has been copied to the "**Workflow Designer Original Forms**" folder in your forms directory. **Any permanent form changes should be made to this original form as it is used throughout the form configuration process as a template. If changes are made to the template, the workflow will need to be executed again to make those changes to the generated forms.**

42. To test out your settings and make sure that files can be uploaded, first we should open the form with the Reform Designer. Navigate to your Forms directory and double click on **DocumentMall.FOM.** When asked to open the associated TextFile, click **Yes**. Verify that the special fields exist on the right hand side of your form.

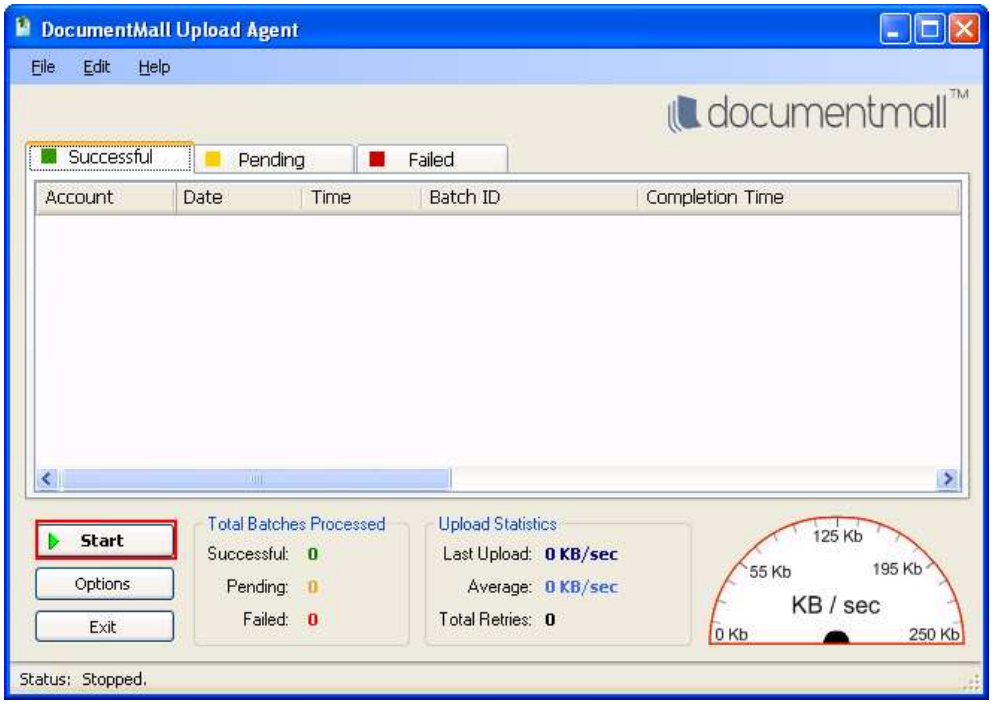
43. Now, we can check if the Upload Agent is running.

    a. If it is running, you should see the icon in the system tray (next to the clock)

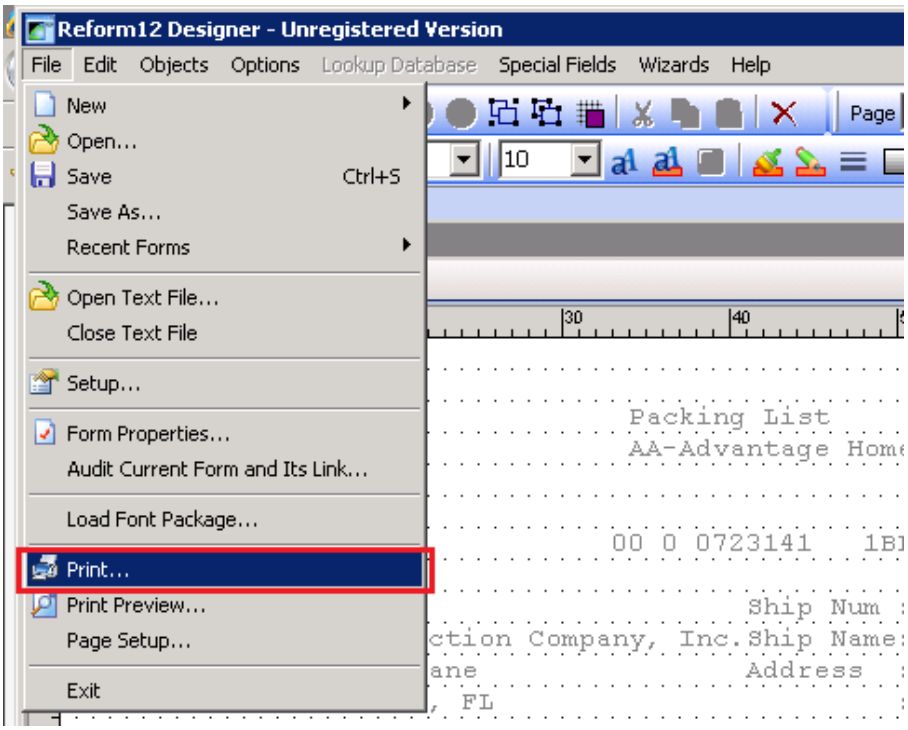
    b. To start it, if it is not running. Go to
    Start>Programs>Reform…>DocumentMall>Upload Agent



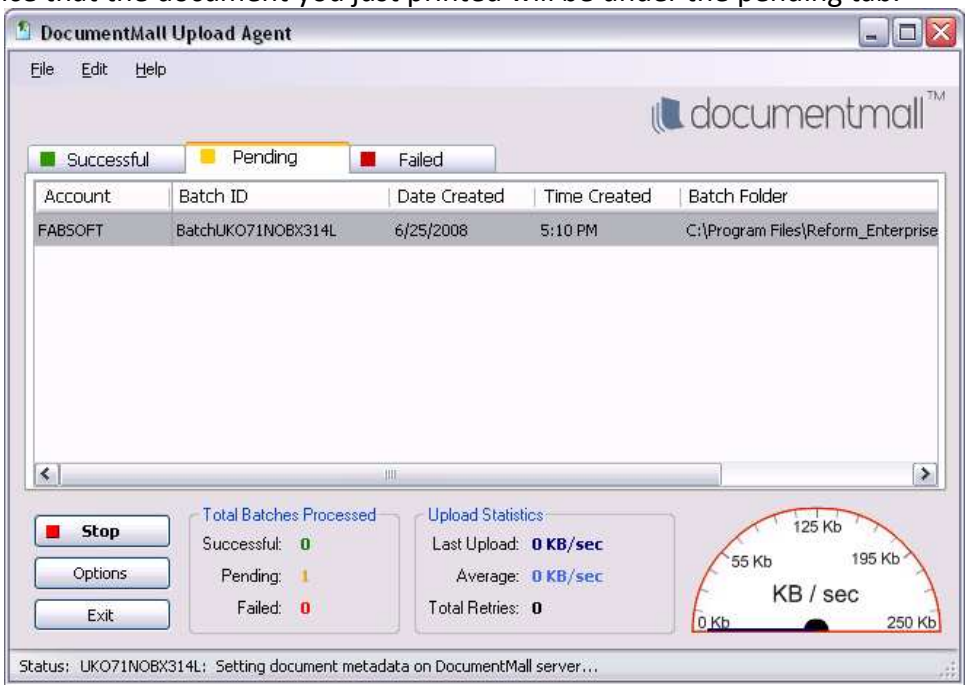
44. In the Upload Agent, click the **Start** button to begin monitoring for DocumentMall jobs.



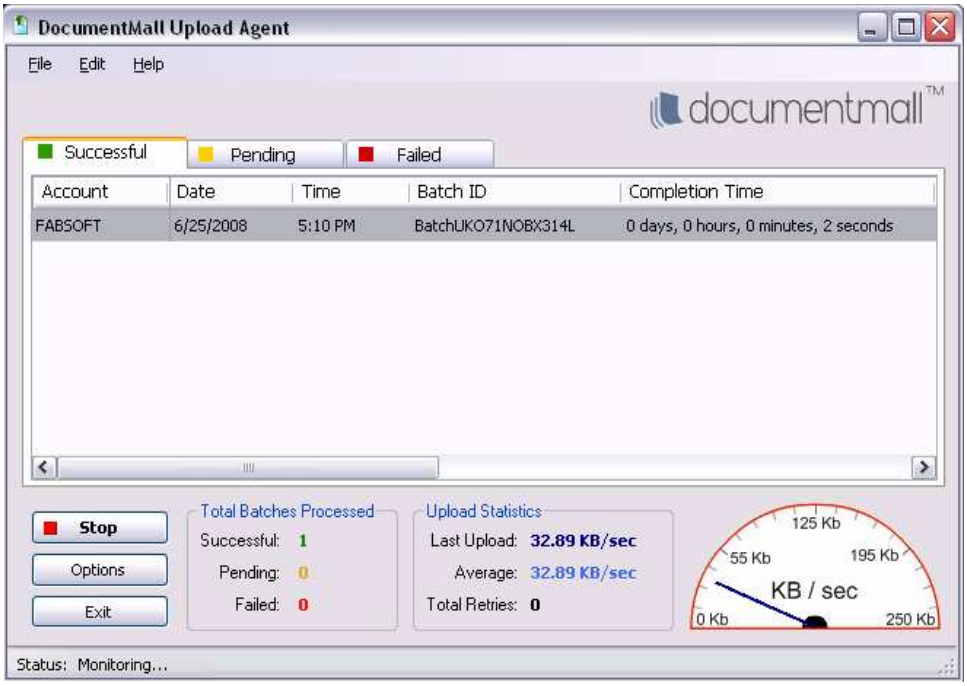
45. Go to **File>Print** in the Reform Designer to send the document to DocumentMall.



46. While it is printing, open the Upload Agent and switch to the **Pending** tab. You will notice that the document you just printed will be under the pending tab.



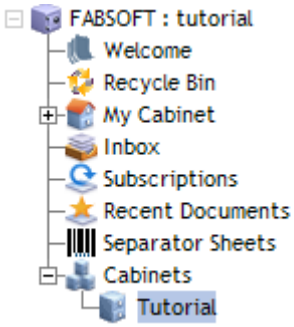
*In a few seconds, the document upload will begin. You will notice the speedometer on the bottom right of the upload agent changing briefly while the file is uploading, and providing there are no errors in your configuration, the document will be uploaded and moved from the Pending tab to the Successful tab.



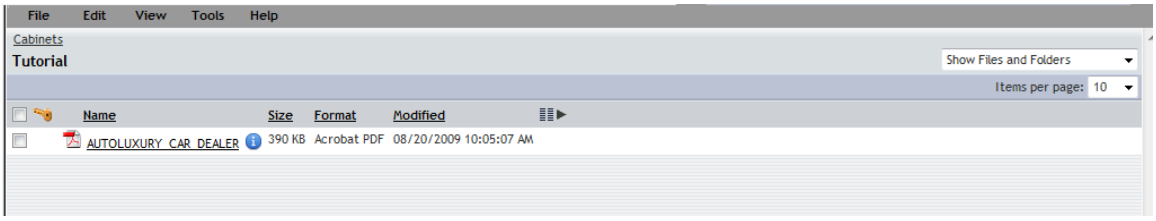
Now we want to log in to the Document Mall account and see our results. Open an Internet Explorer browser and navigate to **http://share.documentmall.com**.

Enter the follow login credentials and click **Login**:
Account: FABSOFT
Login Name: tutorial
Password: tutorial

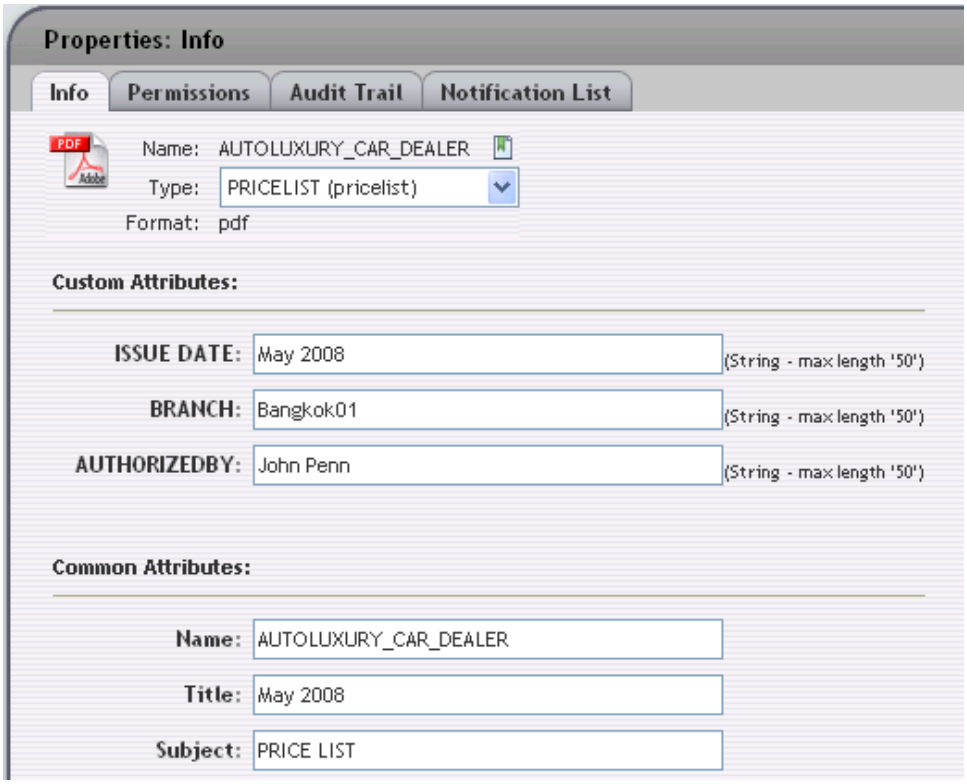
On the left column on the Document Mall interface, expand the **Cabinets** item by clicking the ⊞ icon next to it, and then click **Tutorial**.



You will see the file that you just uploaded called **AUTOLUXURY_CAR_DEALER**.



To view the PDF of your file, click on the file name AUTOLUXURY_CAR_DEALER. Click the ⓘ icon to view the file information.



You can see that the attributes that we chose in the Setup Wizard are all attached to the document.

The document has now been successfully archived into Document Mall.

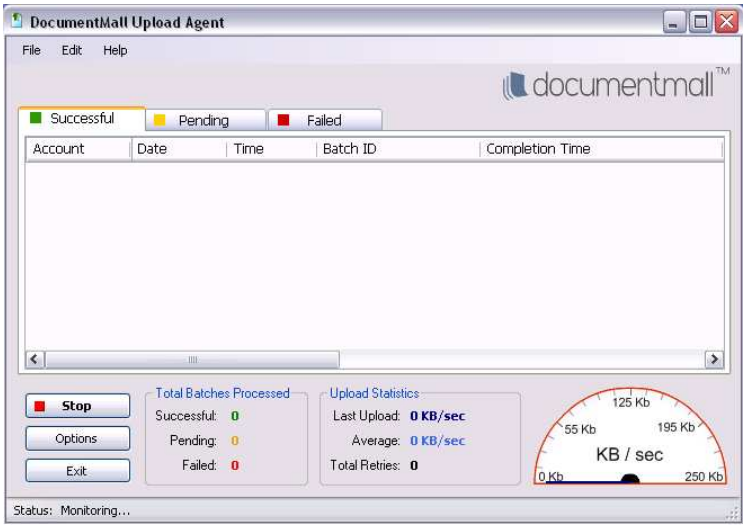
Components of the DocumentMall Plugin

DocumentMall Reform Plug-in

The DocumentMall plug-in allows you to specify settings from within the Reform Designer that will allow Reform to push documents up to a DocumentMall account and organize them as needed.

DocumentMall Upload Agent

This program is responsible for uploading documents to DocumentMall. The program can be run as a Windows service.



Basic Functionality Summary

The DocumentMall Upload Agent monitors its designated upload folders and processes requests as they are received. Requests take the form of folders (containing the outlined files) deposited in the upload directory. These files include the documents specific to the batch and the batch file itself, which contains detailed information about each of the documents in the batch.

When a batch is found, the application first verifies that all needed content files are present (based on the information contained in the batch file). If all files are present and accessible by the DocumentMall Upload Agent application (read/write access), the application prepares to send the batch to the DocumentMall system for processing.

Basic Control Overview

General Buttons

Start/Stop: This button starts and stops the batch upload process.

Options: Allows the administrator to adjust the program's settings and options. This will prompt for the administrative password. Settings should only be modified by Ricoh Certified installers. If you need assistance with your settings, please contact Ricoh.

Double Clicking: Double clicking on a batch opens the respective batch or result file for viewing/editing.

Right-Click Buttons (available from selecting a batch and right-clicking on it)
View Results File: Opens the Results file for viewing in your default XML editor.
View/Edit Batch File: Opens the Batch file for viewing/editing in your default XML editor.
Open Batch Folder: Opens the containing directory for the batch/result file in Explorer.
Copy to Clipboard: Copies the batch information to the clipboard.
Retry: Retries the selected failed batch. (Upload Agent must be started)
Retry All Failed: Retries all batches that have failed. (Upload Agent must be started)

Configuring the DocumentMall Upload Agent

To run the DocumentMall Upload Agent, open the shortcut in the Reform V12 start menu group. Go to:

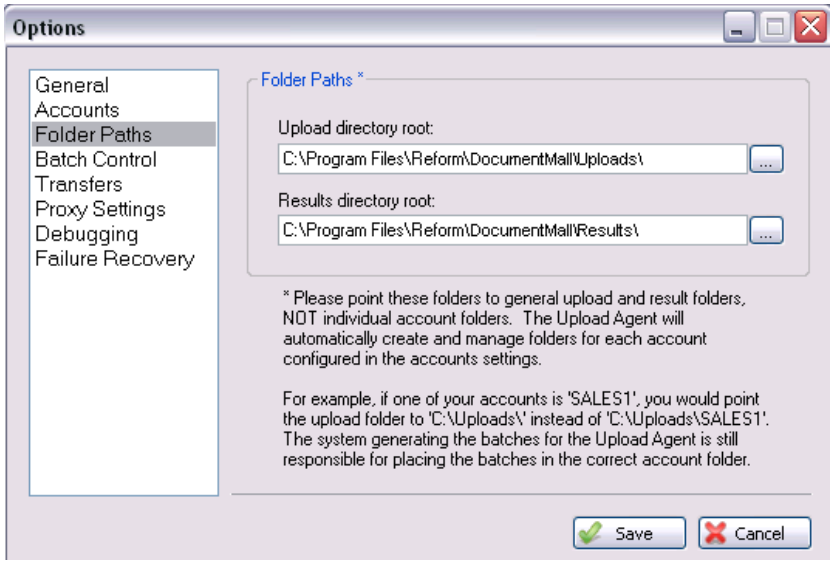
Start>Programs>Reform…>DocumentMall>Upload Agent

To configure a DocumentMall account in the Upload Agent, open the Options window by going to **Edit>Options** in the Upload Agent. When it prompts you for a password, enter: **dmuaconfig**

Click on the **Accounts** item in the left list.

- To edit an account, select it in the Accounts drop-down menu, and change the values.
- To add a new account, click the button next to the Accounts drop-down menu. Type in your account name, press OK, and then fill in your username, password, and what type of account it is.

Next, click on Folder Paths on the left hand side, and choose the paths to your **Upload** and **Results** directories.


Options
General
Accounts
Folder Paths
Batch Control
Transfers
Proxy Settings
Debugging
Failure Recovery
Folder Paths *
Upload directory root:
C:\Program Files\Reform\DocumentMall\Uploads\
Results directory root:
C:\Program Files\Reform\DocumentMall\Results\
* Please point these folders to general upload and result folders, NOT individual account folders. The Upload Agent will automatically create and manage folders for each account configured in the accounts settings.
For example, if one of your accounts is 'SALES1', you would point the upload folder to 'C:\Uploads\' instead of 'C:\Uploads\SALES1'. The system generating the batches for the Upload Agent is still responsible for placing the batches in the correct account folder.
Save
Cancel

The defaults are

C:\Program Files\Reform…\Plugins\DocumentMall\Uploads

and

C:\Program Files\Reform…\Plugins\DocumentMall\Results

Press **Save** to save your changes and close the window. Exit the DocumentMall Upload Agent.

Go to **Control Panel > Administrative Tools>Services** to view installed services. Scroll down until you find an entry for **DM_Upload_Client**. Right-click the item and click **Start**. You will notice that the DocumentMall Upload Agent application will open immediately and start monitoring folders for upload jobs.

Testing the Functionality

To test the connection to DocumentMall from Reform, be sure of the following:

-If you are running the DocumentMall Upload Agent as a standalone application, be sure that it is running

-If you are running the DocumentMall Upload Agent as a service, be sure that the service is started and the monitor is running. It is also important that the service logon account used has administrative privileges on the local computer.

-The Reform Spooler is running and started (Start>Programs>Reform…>Spooler)

Maintenance

There are certain directories that need to be monitored for growth along with the DocumentMall plugin for Reform 12. As a system processes more and more jobs, the size of these directories can grow very quickly. Overall system performance can be affected by the large amounts of space that the files may take up. Obsolete files should be deleted according to your needs and file retention specifications. It is recommended to monitor the following directories for growth:

Directories:

C:\Program Files\Reform…\Backups
C:\Program Files\Reform…\Spooler\ImageQueue
C:\Program Files\Reform…\Plugins\DocumentMall\Results
C:\Program Files\Reform…\Plugins\DocumentMall\Uploads